



## Personal Tax Return (T1) Checklist

General Information	Yes	No	Please Provide	Response
Change in address?	<input type="checkbox"/>	<input type="checkbox"/>	New address, date of move	
Additional dependents?	<input type="checkbox"/>	<input type="checkbox"/>	Name, birthdate, social insurance number	
Change in marital status?	<input type="checkbox"/>	<input type="checkbox"/>	Date and details of change	
Spouse?	<input type="checkbox"/>	<input type="checkbox"/>	Detail of spouse's income during the year (if we are not preparing their return)	
Did you own properties outside of Canada which had a combined cost of over \$100,000?	<input type="checkbox"/>	<input type="checkbox"/>	Provide a list including a description and cost	
Do you consent to allow the CRA to provide your name, address and date of birth to Elections Canada?	<input type="checkbox"/>	<input type="checkbox"/>		
Change to bank account that you would like your tax refund deposited to?	<input type="checkbox"/>	<input type="checkbox"/>	Void cheque or account number	
Tax Credits	Yes	No	Please Provide	Comments
Did you or any of your dependent's attend a post secondary institution during the year?	<input type="checkbox"/>	<input type="checkbox"/>	T2202A	
Are you or your dependent eligible for the disability tax credit?	<input type="checkbox"/>	<input type="checkbox"/>	T2201	
Medical Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Medical receipts (insurance premiums, drug expenses, travel to see specialists)	

Did you pay any student loan interest?	<input type="checkbox"/>	<input type="checkbox"/>	Statement of interest paid from the lending institution	
Dependent child in sports or arts programs?	<input type="checkbox"/>	<input type="checkbox"/>	Receipts and details of the program	
Child care?	<input type="checkbox"/>	<input type="checkbox"/>	Receipts for child care expenses	
<b>Income</b>	<b>Yes</b>	<b>No</b>	<b>Please Provide</b>	<b>Comments</b>
Employment Income	<input type="checkbox"/>	<input type="checkbox"/>	All T4's, T4PS, summary of tips, odd job income	
Pension, Retirement and Annuity Income	<input type="checkbox"/>	<input type="checkbox"/>	T4A(OAS), T4A(P), T4A, T4RIF, T4RSP	
Investment Income	<input type="checkbox"/>	<input type="checkbox"/>	T5's, T3's, T600, T600C, T5013, T5008, details of foreign income, investment expenses (accounting fees, safety deposit boxes)	
Sale of Investments	<input type="checkbox"/>	<input type="checkbox"/>	Transaction slip/details, broker statements, sale documents/details of purchase (land, home)	
Income from Self Employment/Income from Rental Property	<input type="checkbox"/>	<input type="checkbox"/>	Record of all revenues and expenses. Details of any assets sold or purchase during the year, value of closing inventory	
Income from Self Employment – Home Office Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Utilities, mortgage interest, insurance, percentage used for business	
Income from Self Employment – Motor Vehicle Expenses	<input type="checkbox"/>	<input type="checkbox"/>	KM's driven, KM's driven for work, fuel, oil, repairs, insurance, details of vehicle additions/disposals, leasing costs, financing costs	
Other Income	<input type="checkbox"/>	<input type="checkbox"/>	Employment Insurance (T4E), alimony received, WCB Benefits (T5007)	

Deductions	Yes	No	Please Provide	Comments
RRSP contributions	<input type="checkbox"/>	<input type="checkbox"/>	Contributions during 2011 and the first 60 days of 2012	
Employment Expenses	<input type="checkbox"/>	<input type="checkbox"/>	A declaration of condition of employment (T2200) signed by the employer and a listing of the expenses	
Northern Residents	<input type="checkbox"/>	<input type="checkbox"/>	Address, date living at the location, living status (roommates, spouses etc), copy of utility bills for Jan and Dec	
Northern Travel (Box 32 on T4)	<input type="checkbox"/>	<input type="checkbox"/>	T4 with Box 32 filled out, receipts for two trips outside of home town during the year	
Moving Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Old address and new address. Receipts for moving costs, statement of adjustments for sale of previous house, if applicable	